

General Customer / Realtor Information Worksheet

Please provide the information below for the customer/account requesting a short sale:

Name: _____

Account #: _____

Address of mortgaged property: _____

Current address: _____

Home phone: _____

Work phone: _____

Current employer: _____

Employer address: _____

Tenure with employer: _____

Is the property to be short sold owner-occupied (circle one): Yes No

Realtor name: _____

Address: _____

Work phone: _____

Cell phone: _____

Customer Financial Worksheet (Page 1 of 3)

All information **must be completed** for your Short Sale Application to be considered.

Name: _____ Account #: _____

How were the Mortgage Loan Proceeds used?

<u>Uses</u>	<u>Amount</u>	
To purchase this property:	\$ _____	
Payoff other Debt:		
Credit Cards:	\$ _____	
Mortgages:	\$ _____	
Vehicle (e.g., car, boat):	\$ _____	
Living Expenses:	\$ _____	
Make Payments on 1 st Mortgage:	\$ _____	
Home Repairs:	\$ _____	
Repairs on other real estate:	\$ _____	Address: _____ _____
Home Upgrades:	\$ _____	
Upgrades on other real estate:	\$ _____	Address: _____ _____
Purchase other real estate:	\$ _____	Address: _____ _____
Down payment on other real estate:	\$ _____	Address: _____ _____
Purchase other assets (e.g., car, boat, RV):		
	\$ _____	Type: _____
	\$ _____	Type: _____
	\$ _____	Type: _____

Customer Financial Worksheet (Page 2 of 3)

All information **must be completed** for your Short Sale Application to be considered.

Name: _____ Account #: _____

Other Real Estate Owned:

1. Address: _____

1st Mortgage: Lender: _____ Balance: \$ _____

2nd Mortgage: Lender: _____ Balance: \$ _____

2. Address: _____

1st Mortgage: Lender: _____ Balance: \$ _____

2nd Mortgage: Lender: _____ Balance: \$ _____

3. Address: _____

1st Mortgage: Lender: _____ Balance: \$ _____

2nd Mortgage: Lender: _____ Balance: \$ _____

Other Assets (All assets must be disclosed): Statements for all asset accounts **MUST** be included.

Automobile/Truck/Motorcycle: Year: _____ Make: _____ Model: _____
Amount Owed: \$ _____ Lien Holder: _____

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Retirement Account: Type: _____ Value: _____

Investment Account: Type: _____ Value: _____

Bank Account: Type: _____ Value: _____

Bank Account: Type: _____ Value: _____

Savings Account: Type: _____ Value: _____

Other: Description: _____ Value: _____

All assets should be listed. Additional assets not included above may be listed on a separate sheet.

Customer Financial Worksheet (Page 3 of 3)

All information **must be completed** for your Short Sale Application to be considered.

Name: _____ **Account #:** _____

Monthly Income:

Source Name: _____ Monthly Gross/Net: \$ _____ / _____

Source Name: _____ Monthly Gross/Net: \$ _____ / _____

Source Name: _____ Monthly Gross/Net: \$ _____ / _____

Source Name: _____ Monthly Gross/Net: \$ _____ / _____

Monthly Expenses:

Transportation (gas, maintenance, insurance, etc.): \$ _____

Household (food, maintenance, taxes, insurance etc.):
\$ _____

Utilities: \$ _____

HOA: \$ _____

Medical: \$ _____

Insurance: \$ _____

Automobiles/Other: \$ _____

Credit Cards: \$ _____

Are there any other changes to your financial situation since loan origination that we should be aware of that are not already incorporated into your hardship letter? Please explain fully.
